



USER GUIDE (7)

SITE ADMINISTRATION

INDEX

6. Site administration

6.1.	Introduction	Page 2
6.2.	Security – Password policy	Page 3
6.3.	Security – Manage roles	Page 5
6.4.	Security – Manage users	Page 7
6.5.	Database – Personal reference sequences	Page 10
6.6.	Database – Manual updating (tenants)	Page 12
6.7.	Database – Manual updating (households)	Page 15
6.8.	TP Update – Report contacts	Page 16
6.9.	TP Update – Transaction history	Page 17

6.1. An introduction to the Admin functions

There are a number of over-riding controls which landlords can manage to determine how their Tracker site is configured and used.

In each module is a 'Set up' section for managing dropdown lists and other field options.

In the 'Admin' section are controls for managing:

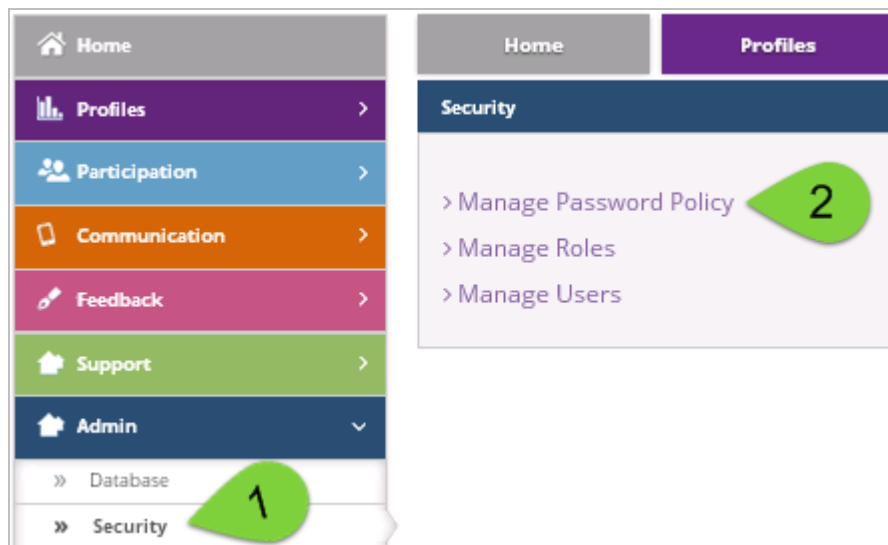
SECURITY

- Manage the format of passwords which can be created for user-access controls;
- Create the password renewal/reset policy for all users;
- Determine where users can go, what they can see and what they can do in Tracker;
- Set up individual users linked to the access packages above;

DATABASE

- Control the automatic generation of 'Personal references' for non-residents who are added manually into Tracker;
- Respond to 'Query reports' generated by the automatic 'TP Update' process which keeps designated fields in your Tracker database synchronised to your main housing management database;
- Manually update other people or households fields in your Tracker database, via ad hoc file uploads as required;
- Access automated files of data exported back out of Tracker using the 'Reverse upload' process for you to update your own database(s).

6.2. Security – Password policy



Click on the 'Manage password policy' option to view the current controls on passwords that are being applied by Tracker:

The screenshot shows the 'Current Security & Password Policy Settings' page. It contains three tables of settings. The first table lists password requirements, the second table lists security options, and the third table lists administrative information. At the bottom right, there are two buttons: 'Turn off Security and Password Policy' (red) and 'Edit Policy' (blue).

Current Security & Password Policy Settings	
Minimum Password Length:	6
Number of uppercase required:	1
Number of lowercase required:	0
Number of special characters required:	0
Number of digits required:	0
Number of unsuccessful attempts allowed:	2
Lockout Duration:	0
Password Expiry Duration:	90

Allow special characters:	No
Allow password change:	Yes
Allow account lockout:	Yes
Force password and passphrase change:	Yes

Admin Contact:	James Mackay
Created By:	Not found
Date Created:	2013-11-29 13:02:38
Last Updated:	2014-08-06 10:01:23

[Turn off Security and Password Policy](#) [Edit Policy](#)

If you want to turn the controls so that there are no restrictions on how passwords can be formatted or when they should be renewed, then click the red 'Turn off security and password policy' button.

If you want to amend the existing controls, click the blue 'Edit policy' button:

Security & Password Policy Settings Help

Minimum Password Length: ☐ Allow special characters Admin Contact:

Number of uppercase required: ☒ Allow password change (allow users to be able to change their password)

Number of lowercase required: ☒ Allow account lockout

Number of special characters required: ☒ Force reset password & passphrase (after admin resets password)

Number of digits required: ☐ Expire Password Today

Number of unsuccessful attempts allowed:

Lockout Duration: minutes

Password Expiry Duration: days

✓ Update Policy

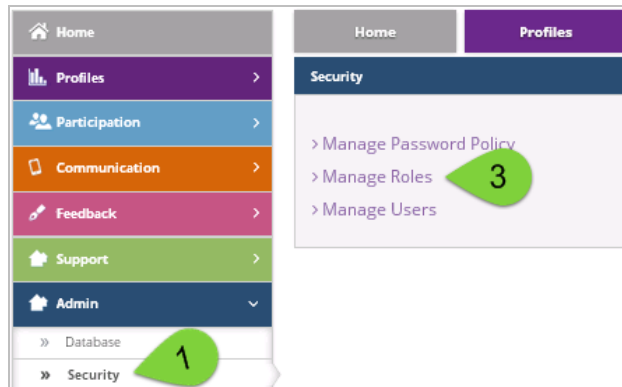
Help

Admin Contact:

The 'Admin contact' field links to messages which users will see if they get blocked at any time: the message will direct them to contact the person named here.

Make any amendments to the settings and click the green 'Update policy' button to save the new settings.

6.3. Security – Manage roles



Click on the 'Manage roles' option to access the controls for creating 'Roles' which determine where users can go, what they can see and what they can do within Tracker. You will initially see a list of all the 'Roles' already set up:

The screenshot shows the 'Roles' management page. At the top, there's a header bar with 'Roles' and a 'Help' icon. Below the header, there's a search bar and a dropdown for 'records per page' set to 10. The main content is a table with columns: Name, No. Users, and actions (View, Edit, Delete). The table lists 17 roles, including 'Arena + Administrator', 'Administrator', 'Level 1', 'Level 3', 'Level 2', 'Profiles', 'Support', 'Feedback', 'Participation', and 'Communication'. At the bottom, there's a pagination bar showing 'Showing 1 to 10 of 17 entries' and a 'Create Role' button.

Name	No. Users	
Arena + Administrator	15	View Edit Delete
Administrator	301	View Edit Delete
Level 1	0	View Edit Delete
Level 3	320	View Edit Delete
Level 2	0	View Edit Delete
Profiles	0	View Edit Delete
Support	0	View Edit Delete
Feedback	0	View Edit Delete
Participation	0	View Edit Delete
Communication	0	View Edit Delete

This list includes some standard, default 'Roles' which you can use but which you cannot edit or delete:

- 'Administrator' gives access to all functions;
- 'Level 3' gives access to all functions except for password and security management;
- 'Level 2' gives access to all functions excluding any admin options;
- 'Level 1' gives 'view only' access and does not allow access to any of the personal data, just reports and analyses.

Roles that you create and name in addition to these, can be edited or deleted as required. To create a new 'Role', click the blue 'Create role' button:

The screenshot shows the 'Role' creation page. At the top, there's a 'Name' input field (4) and a 'Who can use this?' dropdown menu (5) set to 'Everyone can use this role'. Below these are several tabs (6) including 'Arena Partnership', 'Communication', 'Custom Household Fields', 'Custom Property Fields', 'Database', 'Feedback', 'Participation', and 'Participation Admin'. The 'Arena Partnership' tab is selected, showing a list of permissions (7) with checkboxes. At the bottom right, there is a green '+ Create Role' button (8) and a grey 'Reset' button.

Give your new 'Role' a name (4) and leave the 'Who can use this? Field (5) set to 'Everyone can use this' (the other options are for Arena's use only).

Because there are several hundred options within the 'permissions list' (what can be accessed, seen and done), we have broken them up into sections (6) : you can then skip any sections that are not required and just look at the options that you want to consider.

Select a section (6) and the permissions listed below (7) will change. Tick any of the permissions you want to enable for this role and then move on to another section.

If you make a mistake and want to clear all the selections you have made so far, click the grey 'Reset' button and start again.

When you have been through all the relevant sections and ticked all the relevant permissions, save this role by clicking the green 'Create role' button (8).

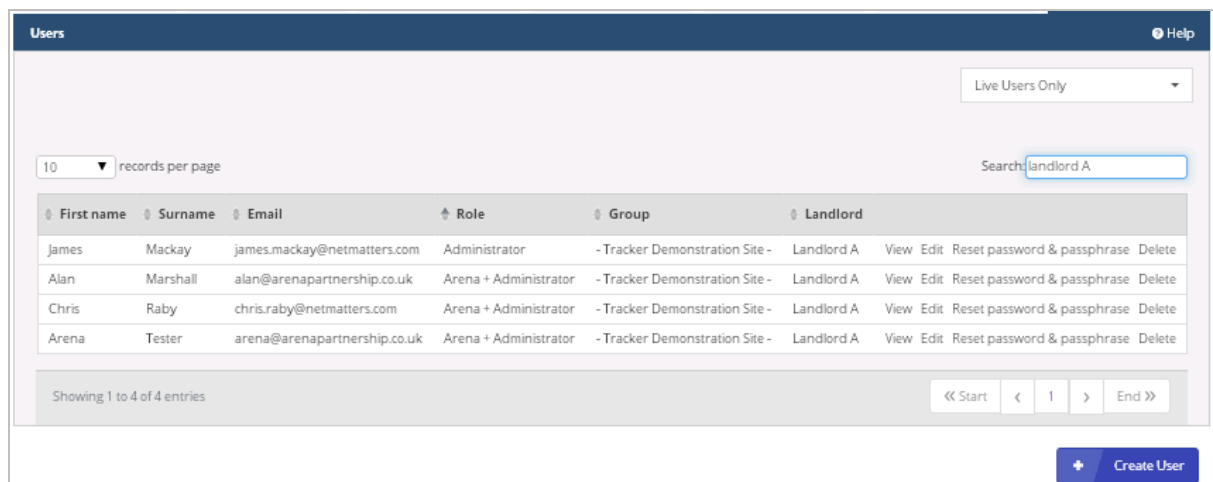
To edit an existing role, go to the list of roles and click the appropriate 'Edit' option.

6.4. Security – Manage users

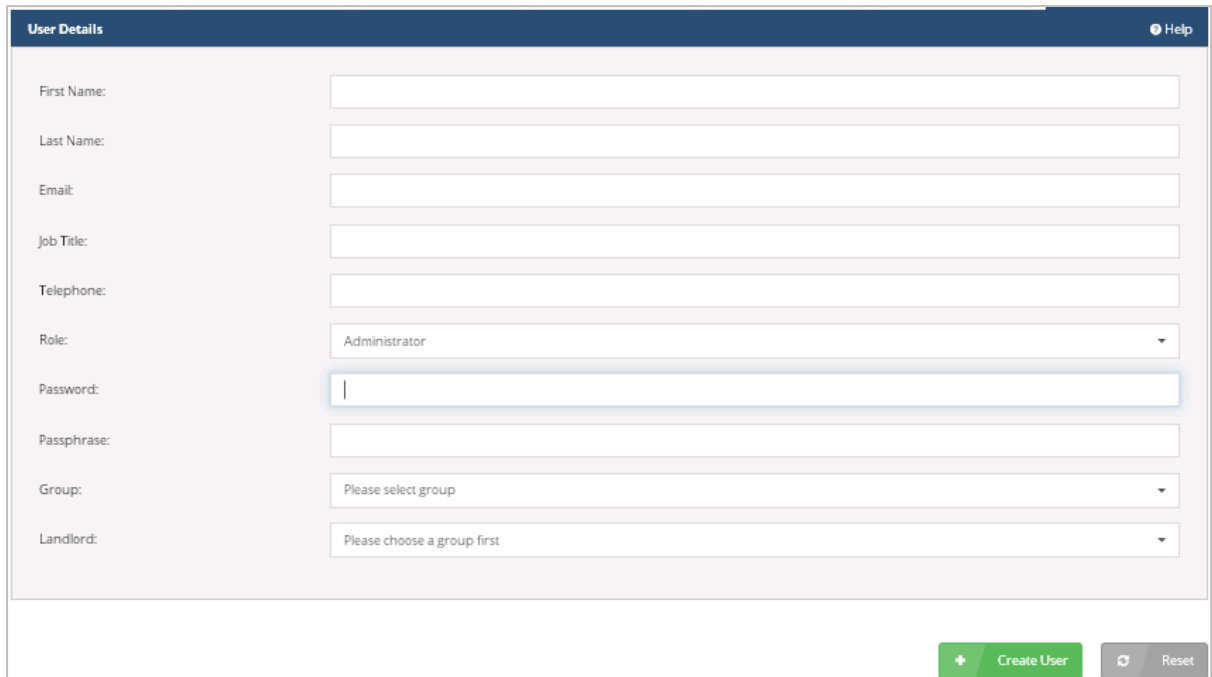


Click on the 'Manage users' option (9) to access the controls for creating new users, amending the security or access settings for existing users, or removing an ex-user from the list.

You will initially see a list of all the 'Users' already set up:



To create a new user, click the blue 'Create user' button:



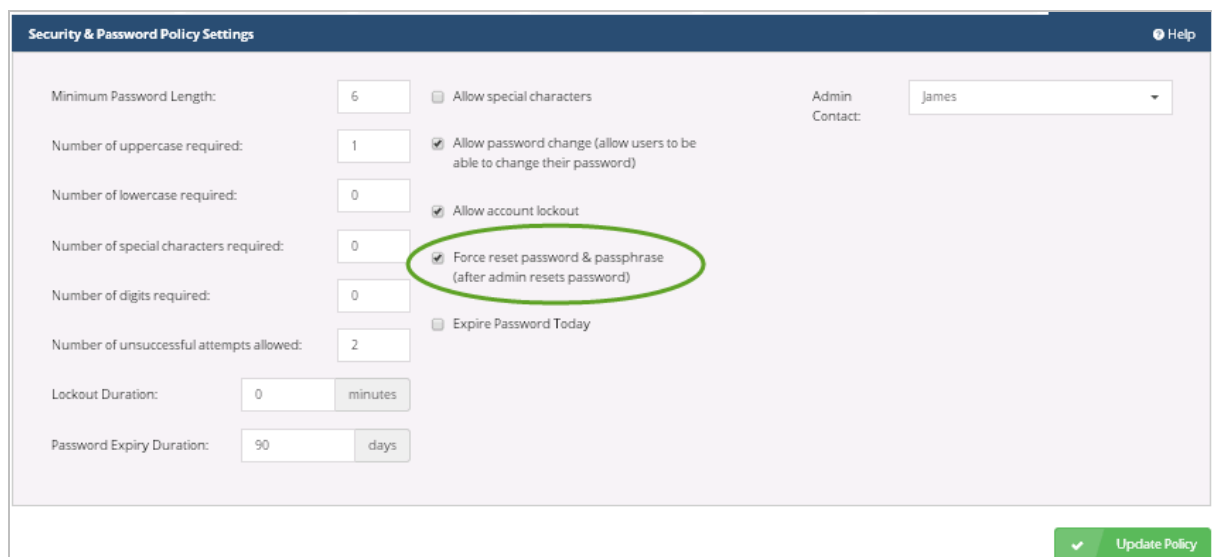
The 'User Details' form includes the following fields:

- First Name: [Text input]
- Last Name: [Text input]
- Email: [Text input]
- Job Title: [Text input]
- Telephone: [Text input]
- Role: [Dropdown menu, currently showing 'Administrator']
- Password: [Text input, highlighted with a blue border]
- Passphrase: [Text input]
- Group: [Dropdown menu, currently showing 'Please select group']
- Landlord: [Dropdown menu, currently showing 'Please choose a group first']

Buttons at the bottom right: **Create User** (green) and **Reset** (grey).

Enter the required personal details of the new user and select the 'Role' from the dropdown list which best defines the access arrangements you want them to have.

Give them an initial password and passphrase: note that these will need to comply with any rules you have set up (see 'Security – Manage password policy' p.3). If your password policy forces users to reset their passwords as soon as they log in following an 'Admin reset' (as here) then this initial password and passphrase will only be used once:



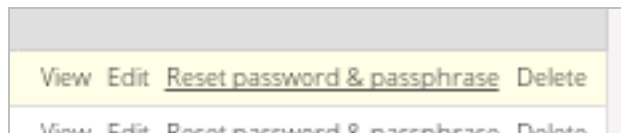
The 'Security & Password Policy Settings' form includes the following settings:

- Minimum Password Length: [6]
- Number of uppercase required: [1]
- Number of lowercase required: [0]
- Number of special characters required: [0]
- Number of digits required: [0]
- Number of unsuccessful attempts allowed: [2]
- Lockout Duration: [0] minutes
- Password Expiry Duration: [90] days
- ☐ Allow special characters
- ☒ Allow password change (allow users to be able to change their password)
- ☒ Allow account lockout
- ☒ Force reset password & passphrase (after admin resets password) (highlighted with a green circle)
- ☐ Expire Password Today
- Admin Contact: [James]

Button at the bottom right: **Update Policy** (green).

The 'Group' and 'Landlord' fields will be pre-populated unless you are managing a group of Tracker sites. In this case you will be able to restrict access to one of the sites only or give access to multiple sites as required.

Click the green 'Create user' button to save the user and settings.



In the list of users, there are options for each to View, Edit or Delete the user and their settings.

There is also an option to 'Reset password and passphrase' for a user: click this if you want to force them to reset next time they log in.

If you want to force EVERYONE to reset next time they log in, you can either:

- (a) Use the screen above and click 'Reset password and passphrase' for each user in the list; or
- (b) Go to the master controls at 'Admin>Security>Manage password policy' and tick the 'Expire passwords today' check box.

A screenshot of the 'Security & Password Policy Settings' form. The form has a dark blue header with the title 'Security & Password Policy Settings' and a 'Help' link. The form is divided into two main sections. The left section contains various password policy settings, each with a label, a text input field, and a checkbox. The right section contains an 'Admin Contact' dropdown menu. The 'Expire Password Today' checkbox is highlighted with a green oval. The 'Update Policy' button is at the bottom right.

Security & Password Policy Settings		Admin Contact: James
Minimum Password Length:	6	<input type="checkbox"/> Allow special characters
Number of uppercase required:	1	<input checked="" type="checkbox"/> Allow password change (allow users to be able to change their password)
Number of lowercase required:	0	<input checked="" type="checkbox"/> Allow account lockout
Number of special characters required:	0	<input checked="" type="checkbox"/> Force reset password & passphrase (after admin resets password)
Number of digits required:	0	<input type="checkbox"/> Expire Password Today
Number of unsuccessful attempts allowed:	2	
Lockout Duration:	0 minutes	
Password Expiry Duration:	90 days	

Update Policy

6.5. Personal reference sequences

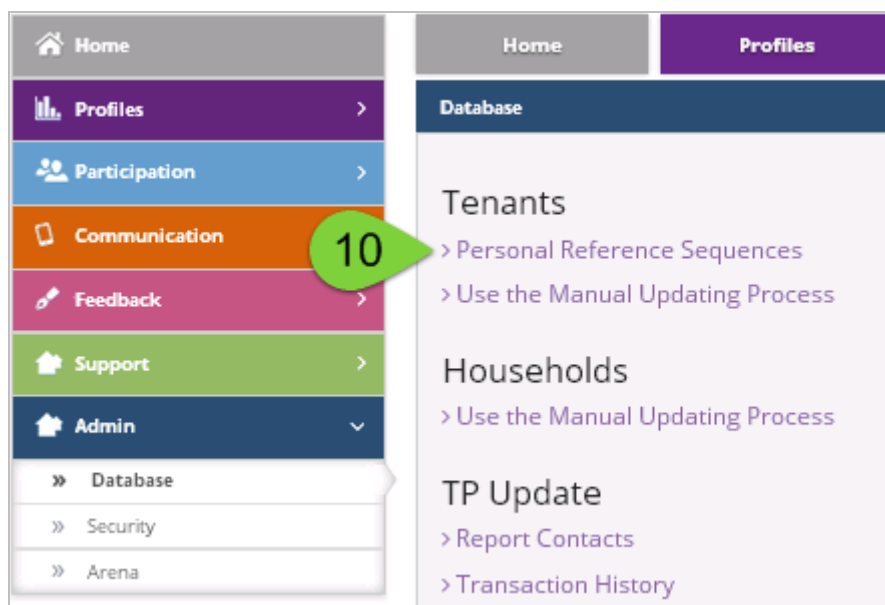
People who are in both the Tracker database and the landlord's own master database, will have the same 'Personal reference' in both databases: these are always generated by the landlord and originate from the landlord's master database.

However, users can add other people (usually service customers or other non-residents) to the Tracker database. Because they are not originating from the landlord's master database Tracker has to generate a 'Personal reference' for each of them.

You can manually enter 'Personal references' but there is always a risk that you may duplicate a reference if you have not carried out thorough checks to discover what the next sequential reference should be.

If you wish, you can set Tracker to create these automatically, keeping a standard format and adding references in correct sequential order for a given 'Tenancy type', only if that 'Tenancy type' is not being managed through the TP Update process from the master database.

Go to 'Admin>Database>Tenants>Personal reference sequences':



Reference Sequencer - Tenancy Types			Help
50 records per page	Search:		
Tenancy Type	Sequence Format		
Co-resident	As uploaded		
Freeholder	As uploaded		
General tenant	As uploaded		
Lease holder	As uploaded		
Non-resident	NR000001		Edit
Non-secured tenant	As uploaded		
Shared owner	As uploaded		
Sheltered Tenant	As uploaded		
Staff accomodtn	As uploaded		
Sub Tenant	As uploaded		
Supported OAP	As uploaded		
Supported Other	As uploaded		

Showing 1 to 14 of 14 entries

« Start < 1 > End »

The first screen will show a list of 'Tenancy types' and in the 'Sequence format' column it will identify those that are linked to the master database by saying that the Personal reference allocated to a record will be "As uploaded".

If a Tenancy type shows a blank in this column, it is not linked to the master database and you can manually add anything you like in the personal reference field when adding a record with this Tenancy type.

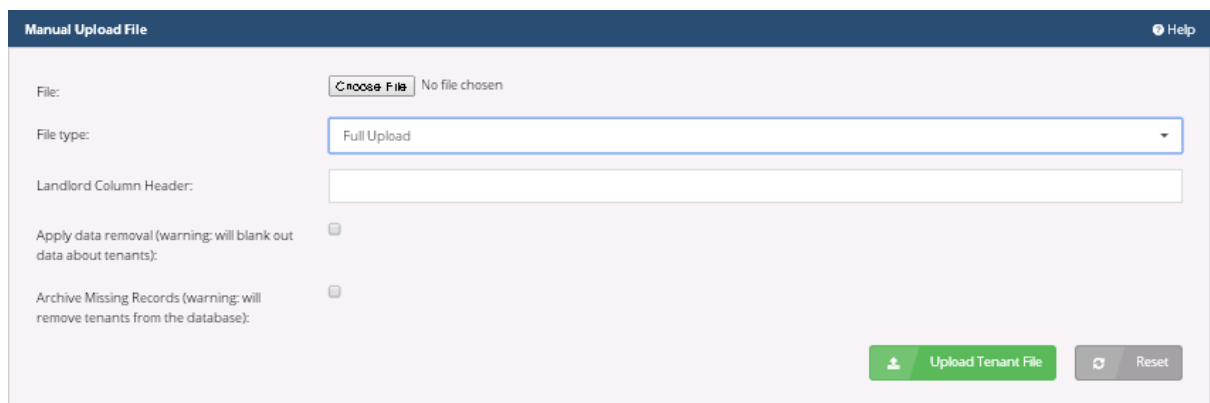
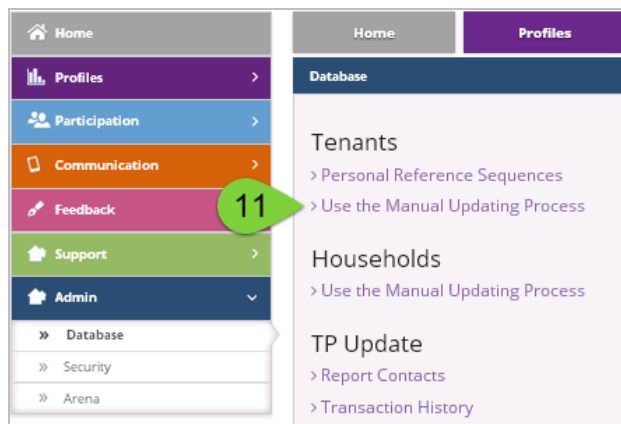
Alternatively, you can click 'Edit' to get Tracker to automatically generate personal references for you:

Edit Non resident Reference Sequence			Help
Non resident	NR	000001	
			Update Sequence

Each reference must comprise a two-letter prefix and a six-digit number. Enter two letters you want as a prefix and the six-digit number from which you wish the sequence of references generated by Tracker to start (numbering from '000001' will avoid problems with Excel when sorting numbers exported from Tracker).

Click the green 'Update sequence' to save your settings.

6.6. Database – Manual updating (tenants)



BROWSE

Browse for the upload file on your system: this must be in Excel.csv format and use the column headers agreed.

[The file template is not yet live on screen – contact the Help Desk for a copy].

FILE TYPE - FULL UPLOAD

Tracker will expect all the agreed upload columns to be present in the upload file and exactly as per the standard wording and format. If the column headers are not present or are worded/formatted incorrectly, then Tracker will reject the upload.

Tracker will also expect all the people who are in your Tracker database (excluding those with a 'protected tenancy type' – see page 14) to be included in the upload file. If any are not, then Tracker will assume they are no longer residents and will 'Archive' them.

FILE TYPE - PARTIAL UPLOAD

Use this facility to update part of your database: e.g. to amend the phone numbers for say 20 people without changing anything else for those people or anything at all for anyone else in the database.

Tracker will only update the fields and records (people) in the Tracker database that are included in your partial upload file:

- Tracker will NOT amend any fields that are not included in the upload file;
- Tracker will ONLY amend the fields that are included in the file for the people who are included in the upload file, not for anyone else;
- Tracker will NOT archive any people who are not included in the upload file, unless you expressly instruct it do so by ticking the 'Archive missing records' check box (see below).

LANDLORD COLUMN HEADER

If you are uploading data for a 'Group' of Tracker sites (several landlord sites linked together with a common database) then you will need to identify the column header in the upload file which will tell Tracker to which site each row of data needs to be linked.

APPLY DATA REMOVAL

Unless you tick this check-box, Tracker will not overwrite data in Tracker if a 'Blank' exists in the relevant field in the upload file.

If you do tick this check-box, Tracker will replace data in Tracker with a 'Blank' from the upload file, but only for those records (people) included in the upload file, not for anyone else.

You can use this feature to delete incorrect data in Tracker.

ARCHIVE MISSING RECORDS

Unless you tick this check-box, Tracker will not archive any records that are missing from the upload file.

If you do tick this check-box, Tracker will archive any record that it does not find in the upload file (as defined by their personal reference), unless the 'Tenancy type' of the record in Tracker is defined as 'Protected'.

PROTECTED TENANCY TYPES

A 'Protected' tenancy type (e.g. 'Non-resident') means that it is not covered by the TP Update process and is manually created and managed within Tracker.

UPLOAD

Click the green 'Upload tenant data file' button to process the upload.

6.7.Database – Manual updating (households)

[Not yet live – contact the Help Desk if you need this function]

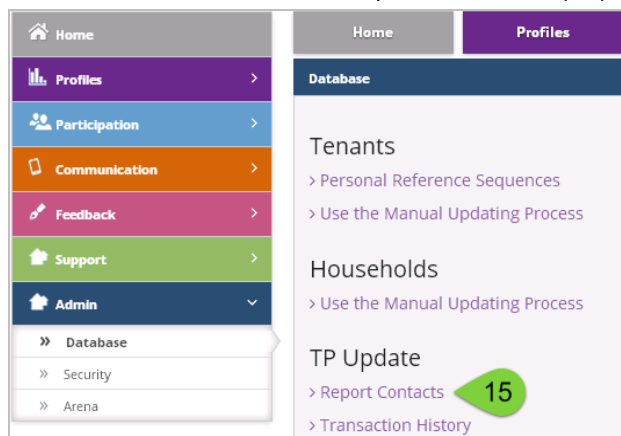
6.8. TP Update – Report contacts

If you are using the automated TP Update process to maintain the alignment of your Tracker database with your master database, then Tracker may generate 'Alert' emails.

These will report back to you on the outcomes of each update. They may also include a link for you to review any queries raised.

You need to tell Tracker who these emails should be sent to: that may be more than one person and you can add or amend their emails through this screen.

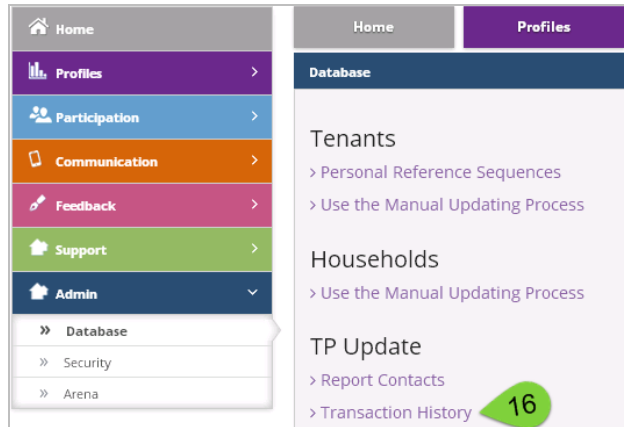
Go to 'Admin>Database>Report contacts' (15):



Delete any emails you no longer want included and/or add any new emails: click the 'Create report contact' button to save.

6.9.TP Update – Transaction history

Here you can see all the files that have been uploaded via the automated TP Update process:



Transaction History				Help
		Upload Status: All		
50 records per page		Search:		
Date	File	Upload Status		
10/03/2015 14:28:36	Landlord A partial upload.csv	Processed.		View Summary
10/03/2015 14:19:32	Landlord A partial upload.csv	Processed.		View Summary
12/02/2015 10:54:49	TPTracker.csv	Processed.		View Summary
12/02/2015 09:10:04	TPTracker.csv	Failed. (Error! File TPTracker0.csv was not found when attempting to get file column headers!)		

The 'Upload status' column will identify if any uploads failed and the reasons why. For successful uploads, click 'View summary' to see a report of what happened:

Upload Summary		Help
Processing Type	Count of records in type	
Records created	0	
Records updated	4223	
Records skipped	4	
Records archived	0	
Queried and held	0	
Failed	0	

RECORDS CREATED

This is the number of new records (people) added to the database: i.e. someone found in the upload file who was not already in the Tracker database so is assumed to be a new resident.

RECORDS UPDATED

These are records where a change was made to one or more fields because the upload file was different to the existing data in Tracker.

RECORDS SKIPPED

There were no differences between the data held in Tracker and the data uploaded so Tracker skipped these records without making any changes.

RECORDS ARCHIVED

These are records existing in Tracker which were not included in the upload (and the upload was not designated as a 'partial upload') so Tracker assumed they were no longer residents and archived them.

QUERIED AND HELD

These records included one or more field where (a) there was a difference in the data and (b) the field is designated as 'Query and hold' rather than 'Automatically over-write'.

[Call the Help Desk if you want to change any of these settings].

If there are any queries, the 'View summary' link will be replaced with a 'Check & upload' link to the right of the upload file details:

Date	File	Upload Status	
13/03/2015 18:00:28	TPTracker.csv	Processing partially completed.	Check & Upload

The summary report will then include a further link for you to review the queries and 'Select which queries to upload':

Ready for Upload			Help
Processing Type	Count of records in type	Actions	
Records already created	0		
Records already updated	220		
Records skipped	41840		
Records already archived	0		
Queried and held	82 (0 selected)	Select which held queries to upload	
Failed	0		
			<input checked="" type="checkbox"/> Complete Data Upload

You will then see each of the queries and can select those which you wish to be included in the update (tick these) or which you wish the update process to ignore (leave these unticked).

Queried and Held Records from upload

50 records per page

Search:

Personal Reference

Data Queries

☐ Include Query in Upload

100731	Changed from tenancy_type = 'New Hybrid GN Assured S13' to tenancy_type = 'New Hybrid GN Asd S\hld S'	<input type="checkbox"/>
10516	Changed from tenancy_type = 'New Hybrid SH C2 Asd Shld' to tenancy_type = 'OH Warrington Shrd O\'shp'	<input type="checkbox"/>
1122220990006	Changed from tenancy_type = 'GN Assured Section 13 RTB' to tenancy_type = 'Ownr Occ. MHAPrivateCareL'	<input type="checkbox"/>
112824	Changed from tenancy_type = 'Supported License' to tenancy_type = 'SU Supported Assured'	<input type="checkbox"/>

241113-1	Changed from tenancy_type = 'Ownr Occ. MHAPrivateCareL' to tenancy_type = 'GN Assured Section 13 RTB'	<input type="checkbox"/>
246947	Changed from tenancy_type = 'New Hybrid GN Assured S13' to tenancy_type = 'New Hybrid GN Asd S\hld S'	<input type="checkbox"/>
247392	Changed from tenancy_type = 'GN Assured' to tenancy_type = 'GN RTB Leasehold'	<input type="checkbox"/>

Showing 1 to 50 of 101 entries

<< Start

< 1 2 3 >

End >>

+ Include selected in Upload

Ignore ALL and go back to upload screen

When you have ticked those queries you want to be included in the upload process, click the purple 'Include selected in upload' button.

If you wish the update process to ignore all the queries, click the grey 'Ignore all and go back to upload screen' button.

You will then be returned to the summary report screen:

Ready for Upload			Help
Processing Type	Count of records in type	Actions	
Records already created	0		
Records already updated	220		
Records skipped	41840		
Records already archived	0		
Queried and held	82 (0 selected)	Select which held queries to upload	
Failed	0		

☒ Complete Data Upload

Click the green 'Complete data upload' button to complete the update process.

Arena Partnership Ltd

Rowan House

Queens Road

Hethersett

NR9 3DB

T: 01603 813932

W: www.arenapartnership.co.uk

E: support@arenapartnership.co.uk